

14. POSITION SUMMARY

Under the limited progressing to general supervision of the Supply & Mail Services Section Chief, this position provides critical support services to several department programs and is responsible for maintaining the accuracy and quality of the Department's address databases. This position partners with staff from the Bureau of Information Technology Services, the Division of Retirement Services, and the Division of Trust Finance to coordinate processing the address databases through USPS approved software to obtain change of addresses; updates the databases to ensure Employee Trust Funds (ETF) continues to receive the USPS discount and does not incur penalties and researches addresses that are incorrect. Duties and responsibilities also include inter- and intra-departmental mail; pickup, sorting and delivery of mail throughout the agency; processing outgoing office generated U.S. mail; providing backup support services to other staff and other duties as assigned.

Services provided by this section include processing more than 400,000 pieces of incoming and outgoing U.S., inter- and intra-departmental mail annually; inventorying, ordering, stocking, and issuing over 500 different forms and brochures; purchasing and stocking departmental office supplies of over \$50,000 annually; filling and delivering over 30,000 annual employer, IVR, internal forms and office supply requests; and preparing a variety of different benefit pre-packets for a total annual volume prepared of more than 40,000.

The services provided by this position require extreme accuracy and timeliness as a participant's benefit eligibility and amount, beneficiaries eligible for survivor benefits, and interest penalties charged to employers are determined by timely and accurate receipt, filing, and processing of required forms and information.

This position requires regular walking, standing, bending and daily lifting of mail totes, boxes of reports, copy paper, forms, and UPS and Fed Express deliveries.

15. GOALS & WORKER ACTIVITIES

35% GOAL A: Perform address research and update internal employer and participant address tables. Maintain the accuracy and quality control of all agency address databases to ensure USPS compliance for mailing and discounts.

Worker
Activity

- A.1 Research non-compliant addresses through various internal software and external web sites to obtain USPS compliant addresses and update respective address tables.
- A.2 Serve on various committees, as assigned, to provide input and resources on address compliance and updates.
- A.3 Process returned mail from the presort vendor, United Mail Services (UMS) , by locating source of mailing. Route mail according to section procedures.

- A.4 Stay current on USPS address formatting requirements and industry software to obtain the most up-to-date address availability.
- A.5 Recommend training materials and oral and written communications, for use throughout the agency, to ensure all staff understand current and future address formatting requirements.
- A.6 Process daily address change forms ET-2815 and ET-2802, and USPS Address Change Form 3547, according to department procedures.
- A.7 Investigate employer keyed addresses from daily Wisconsin Employee Benefit System (WEBS) error reports and update WEBS with corrected addresses. Forward incomplete or incorrect addresses to the Employer & Contact Services Bureau for additional follow-up with employers.
- A.8 Work closely with appropriate IT staff to perform testing of new address update routines and processes in applicable systems, such as WEBS, MEBS, BPS, etc.
- A.9 Work closely with IT staff on the National Change of Address (NCOA) software to understand available features. Create templates and submit jobs to obtain USPS updated addresses independent from monthly and quarterly updates.
- A.10 Assist in the research of participants that are identified as lost contacts utilizing myETF and other available applications.
- A.11 Conduct research on the NCOA spreadsheets on a monthly, quarterly, and yearly basis. Update appropriate databases with correct and current information.

20% GOAL B: Responsible for incoming mail and workflow processing services for U.S., Fed Ex, UPS, and/or inter- and intra-departmental mail.

Worker

Activity

- B.1 Receive incoming U.S. and other courier delivered mail to ensure that daily incoming mail is processed accurately and timely.
- B.2 Sort mail into categories in accordance with established Department procedures to ensure that participant and employer mail is processed accurately and timely.
- B.3 Open, date stamp, and distribute mail in accordance with established Department work instructions to ensure that participant benefits are not denied and that employer reports are received timely to avoid interest penalties. Inform lead worker and Supervisor of updates to the mail distribution lists to ensure proper distribution and routing.

- B.4 Sort mail into established slots for proper distribution according to established workflow procedures.
- B.5 Sort and review documents for first unit routing or manual exception processing. This requires knowledge of the Department's benefit programs and over 5,000 incoming forms or document types.
- B.6 Determine document types and priorities for processing based on knowledge of business user needs.
- B.7 Sort and code mail with pertinent Social Security numbers, Member ID numbers, or employer identification numbers for proper distribution and to ensure proper identification for first unit processing in Records Management.
- B.8 Route confidential/personal mail directly into proper addressee's folders on the mail cart in accordance with established Department procedures.
- B.9 Research independently the proper distribution and routing of misdirected and/or unclearly marked mail.
- B.10 Log, notify recipient, and ensure timely pickup or delivery of incoming certified, UPS, Federal Express, and registered mail.
- B.11 Log and route faxes according to established workflow procedures.
- B.12 Operate the envelope opener and dating equipment as necessary for processing incoming mail.

20% GOAL C: Primary Responsibility for Office Supply Program Ordering, Stocking, and Issue. Backs up the maintenance of the Department's forms and supply inventory systems.

Worker
Activity

- C.1 Maintain ongoing knowledge of the supply inventory systems software and how to utilize it in an effective manner.
- C.2 Recommend changes and/or report problems to supervisor and work with IT staff on supply inventory systems changes or technical problems encountered while utilizing the system.
- C.3 Initiate reorder of Department office supplies at minimum reorder levels as required to maintain minimal and adequate available quantities. Coordinate office supply inventory and reorder levels with other staff.
- C.4 Receive, verify, stock and/or deliver incoming supplies. Maintain required paperwork for reconciling purchasing card (p-card) purchases.

- C.5 Use the Department purchasing card when purchasing supplies, monitor charges, and promptly reconcile monthly p-card statements.
- C.6 Ensure internal staff requests for office supplies are filled and delivered accurately and timely.
- C.7 Research state contract office supply vendor, and other vendor catalogs. Work with appropriate vendor's Customer Service for Department office supplies to determine most cost-effective purchases. Initiate appropriate orders via internet systems according to DOA bulletins and office supply purchase guidelines.
- C.8 Act as liaison to office supply vendors regarding complaints, new merchandise and returns.
- C.9 Coordinate appropriate standard and non-standard supply purchase approvals with the unit director or supervisor on items over specified amounts.
- C.10 Provide office supplies, forms, brochures to customers at counter or through inter-departmental mail services.
- C.11 Assist in taking physical inventory for all the ETF office supplies on an annual basis and, when needed, assist with taking physical inventory of our forms at the warehouse.

15% GOAL D: Management of imaged member records, image software, and the workflow system.

Worker
Activity

- D.1 Process incoming mail to distinguish which incoming forms and documents are considered first unit route versus internally generated documents.
- D.2 Review first unit route documents for readability and completeness in order to build batches for scanning utilizing document standards.
- D.3 Develop and maintain knowledge of which documents are first unit routed workflow documents for business processes versus drop filed documents and question those that appear to be incorrect and determine priority processing.
- D.4 Prepare documents for scanning and ensure the documents meet all imaging standards. Determine handling based on what is found; use knowledge of the Department's programs, systems, and software to look up missing information; and consult with program staff or SAMS as needed.

- D.5 For agency critical documents, determine what type of batch they must be processed in. Perform an additional review to ensure that no white out has been used, information is not crossed off, and document has an ink signature. Determine handling based on what is found and consult with program staff as needed.
- D.6 Scan the documents by selecting the correct type of batch processing in the scanning subsystem to ensure all documents are scanned correctly.
- D.7 Perform quality review of each document during scanning and index by verifying an image exists for each piece of paper; document was prepped correctly; readability; correct image orientation; and completeness. Make corrections or rescan all documents that do not meet the document quality standards.
- D.8 Index each document by keying the correct Social Security number/Member ID, document number and all additional applicable indexing fields. Verify all applicable information has been entered correctly, annotations are added, multi-page documents are all there as one image, and image quality is acceptable.
- D.9 Ensure program staff imaging instructions are followed on the ET-9100, Document Maintenance Sheet. The instructions on the ET-9100 affect the entire imaging process and determine proper handling of the documents. Follow up with program staff if the ET-9100 is not legible or missing information.
- D.10 Perform all required post-index steps by properly handling patch pages, exporting the batch, completing the control log, and filing the batch in the correct box.

10% GOAL E: Provide program support to the SAMS and Member Services Bureau; and completion of other tasks as assigned.

Worker
Activity

- E.1 Pull forms and process member requests, via the call center, from daily forms/brochure pull list.
- E.2 Assist in assembling pre-packeted information for benefit pre-packets and ensure all required information for participants is included.
- E.3 Ensure orders placed by Outreach Specialists for field presentations are filled accurately and within the established deadline.
- E.4 Other duties as assigned by Supervisor.
- E.5 Maintain knowledge and ongoing awareness of Department values.

KNOWLEDGE, SKILLS AND ABILITIES

1. Excellent interpersonal skills and customer service techniques.
2. Effective time management, organizational and priority setting techniques, including the ability to prioritize for effective workload management.
3. Excellent attention to detail and accuracy skills.
4. Clear and effective oral and written communication skills.
5. Ability to develop and maintain effective working relationships with persons at various levels internal and external to the organization and.
6. Knowledge of research methods and record keeping techniques.
7. Knowledge and ability to operate mail and office related equipment.
8. Knowledge of federal (U.S.P.S.) postal regulations, proper address formats, zip codes, handling of certified, foreign, and misdirected mail.
9. Knowledge of shipping techniques, resources, and procedures.
10. Excellent skill and knowledge in accurate typing and ten-key for on-line entry and quality review of data to create and update records.
11. Ability to lift, push, and carry materials weighing up to 50 lbs.
12. Knowledge and observance of safe lifting methods.
13. Ability to understand and comply with all ETF and enterprise security standards, policies, processes, and procedures.
14. Problem solving analysis and research skills, including the ability to apply creativity in thinking and problem solving.
15. Ability to analyze facts and problems, infer and decide on potential and appropriate solutions.
16. Skill and knowledge of the uses and applications of computer programs and data entry including mail-related software and Microsoft Office suite products such as Word, Excel, Access, and Outlook.
17. Ability to stand, stoop, twist, and bend routinely and repeatedly throughout the work shift.
18. Knowledge of the uses of scanning equipment and subsystem software.
19. Knowledge of imaging and workflow software.